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ABSTRACT

Phase I of "A Task Analysis of Library Jobs in the State of Illinois" (ED 040723), the SERD Report (Social, Educational Research and Development, Inc.) is viewed as a working document. The need in Phase II is to relate the data collected to real library situations. One objective of Phase II is to obtain opinions from professional librarians on the applicability of the American Library Association Library Education and Manpower policies based on actual tasks performed in a variety of libraries. A second objective of Phase II is to develop recommendations for materials and programs for use by librarians. Phase III of the project will develop and disseminate such materials and programs. (Related documents are LI 003 856 through LI 003 858.) (SJ)

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ILLINOIS LIBRARY TASK ANALYSIS PROJECT

PHASE II

Project Proposal

Introduction

Library administrators of all types of libraries in Illinois are acutely concerned with the necessity of using all staff and positions to the maximum advantage and with the alleviation of chronic shortages of personnel for many kinds of library work. If the more usual tasks of Illinois libraries can be fully identified and thoroughly analyzed, library administrators should be able to reorganize their staffs for more effective use of personnel, administrators of the new two-year colleges and of the major libraries could have better guidelines for sub-professional training programs, and the entire profession would benefit from the experience and judgments of Illinois librarians.

In an attempt to identify these more usual tasks and provide personnel instruments for the profession, a multi-phase Illinois Library Task Analysis Project was proposed, the first phase of which is now completed with the submission of "A Task Analysis of Library Jobs in the State of Illinois." This report, undertaken by the Social, Educational Research and Development, Inc., of Silver Spring, Maryland, covers an analysis of the tasks in eighteen carefully chosen Illinois libraries. The data developed is comprised of a descriptionof approximately 1,600 tasks, each rated against performance standards, task environment,the extent to which the task concerned data, people, and things, the mathematics, language, and reasoning levels required by the task, the kinds of instructions the worker received in conducting the task, the training time, the time taken to complete the task, and the physical demands of the task--some 400,000 bits of information. Each step of Phase I of the project was supervised by the Advisory Committee to the project.

The Advisory Committee is pleased with the basic document, but it is at this point only a working document for those who are prepared to make considerable effort to understand the techniques employed in developing the data. The need now is to relate the data developed to the professional settings in which the described tasks are likely to take place. It is necessary to manipulate the data in the original report using the imaginative, experienced judgment of a number of librarians with the expectation that they will develop appropriate organizational models.

This can obviously take many forms. The reports of the Interdivisional Ad Hoc Committee of the Library Education Division and the Library Administration Division on "The Subprofessional or Technical Assistant" (popularly called "The Deininger Report") and the position paper on "Education and Manpower for Librarianship" issued by the ALA Office for Library Education have helpful analyses and have now both become policy positions of the American Library Association. The Deininger report contains a brief outline of appropriate tasks to be performed by library personnel at the subprofessional level;

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the position paper suggests five personnel classifications which would help to make more effective use of library staffs at different levels of responsibility. The 400,000 bits of information from Phase I need to be related to the theoretical framework of the policy positions by persons whose experience with libraries suggests and ability to see potential in varying organizational patterns.

Objective

One objective of Phase II, therefore, is to obtain the considered opinion of knowledgeable, experienced, and creative professional librarians as to the applicability of the two ALA statements in terms of the tasks now being performed in a representative selection of several types of libraries. Another objective of Phase II is to develop recommendations for materials and programs for use by the profession. Such materials will be developed and disseminated in Phase III of the project, and will probably be of two major types: (1) materials which will help administrators look critically at staff assignments with a view to more effective utilization, for example:

A revision of the Descriptive List of Professional and Non-Professional Tasks in Libraries,

A catalog of job descriptions which might apply to various sizes and kinds of libraries,

A series of simulation exercises designed to assist administrators in evaluating their own use of personnel and to stimulate the structuring of new assignments,

and (2) tools and activities which would help the profession define more carefully the qualifications and training needs for library supportive personnel, for example:

A specific curriculum guide for various levels of sub-professional training,

The development of new kinds of in-service training programs.

Other needs will probably be identified during Phase II.

Operational Procedures

The project will be administered by the Illinois Library Association. The Advisory Committee will comprise representatives of the Illinois Library Association ad hoc Committee on Manpower Training and Utilization, the Library Education Division of the American Library Association, and the Library Administration Division of the American Library Association.

The Advisory Committee will select three knowledgeable librarians and charge them with examining the data collected in Phase I against the perspective of their own uniquely qualifying experience. The three consultants for this part of Phase II will, after discussion with the Advisory Committee, each design a method of analyzing and structuring the data for further use. Each design for data analysis will be based upon a different concept of staff utilization and work flow: for example, relation of tasks by such employee personal interests as creative writing or the use of mechanical equipment, relation of tasks by traditional functional structures such as acquisitions or children's services, relation of tasks solely by level of education required, or relation of tasks by independence or autonomy of employee and dependence or degree of supervision given the employee.

Each investigator will be charged with exploring the organization of tasks to permit an upward career movement. Each will prepare a working paper in which his unique arrangement of the tasks would be related to the Deininger and Asheim statements, thus affording an opportunity to look at the profession's positions in relation to the reality of tasks now being performed. Each will also suggest realignment of tasks into new job structures.

The three consultants will meet with the Advisory Committee to clarify the charge. They will be given an opportunity to meet with a computer consultant for not more than five days in order to clarify the kinds of instructions to be given the programmer who will provide machine analysis of the data collected in Phase I. While all data has been recorded on punch cards some additional key-punching may be required and the budget proposal allows for this. It is anticipated that if basic agreement as to the manner in which the data is to be handled by each of the three consultants can be achieved approximately four weeks of programmer time will be needed, but probably very little time in computer runs.

Part II of Phase II will include the review of the consultants' working papers by a panel of librarians, administrators, educators, personnel specialists and social scientists. The panel will discuss the working papers, review the organizational models and job structures, and recommend the development of tools and materials from the information generated by the task analysis project.

Phase III would also be structured in two parts. During Part I, materials suggested in Phase II (see above) will be drafted, and Part II will comprise a series of state and regional conferences to evaluate and disseminate the developed materials among library administrators and educators, and to make further recommendations for materials to be developed by library associations, library schools, governmental agencies, etc.

Time required

Six months from the time funding has been assured will be required to complete Phase II.

Funds necessary

Initial estimates call for an expenditure of $22,800 for Phase II of this project. (See attached budget).

A SUMMARY OF THE DISCUSSION AND RECOMMENDATIONS
of the Review Panel for Phase II of the Illinois Library Task Analysis Project meeting in Chicago, October 21-23, 1971.

The Illinois Library Association under the guidance of an Ad Hoc Committee on Manpower Training and Utilization has been engaged since 1967 in examining the utilization of personnel in Illinois libraries to the end of achieving more effective personnel utilization.

The Illinois Ad Hoc Committee was joined in the activities by the Library Education and Library Administration Divisions of the American Library Association. The Illinois State Library funded a library task analysis project with a grant of Library Service and Construction Act funds.

To conduct a task analysis study, the Illinois Library Association engaged the Social, Educational Research and Development, Inc. (SERD) of Silver Spring, Maryland. SERD studied the work being performed by the personnel of eighteen academic, public, school and special libraries in Illinois and submitted its report, A Task Analysis of Library Jobs in the State of Illinois, in June, 1970.

Mr. Thomas M. Brown, Chairman, and the members of the Ad Hoc Committee upon receipt of the SERD report had a basic document in which 1615 tasks had been identified as being performed by personnel in the eighteen libraries. The SERD study defined a task as the smallest item of work, action or activity involved in a job. The study explained that a job could have several hundred tasks while some jobs would have only a few. Task analysis identifies thetasks on a job, and measures and compares on a variety of scales the kinds and levels of manual and intellectual skills and efforts involved in the task.

The Ad Hoc Committee commissioned three additional studies by three library consultants. These studies were to examine the task analysis data compiled by SERD against the perspective of their own uniquely qualifying experience. The consultants' reports received in October, 1971 were as follows:

Canelas, Dale Brunelle
Task analysis of library jobs in the State of Illinois: a working paper on the relevance of the study to academic libraries. 1971.

Ricking, Myrl
Illinois Task Analysis Project, Phase II: A study prepared by Myrl Ricking, Manpower Resources, 2126 Connecticut Avenue, N.W., Washington, D.C. 20008. 1971.

Wiese, M. Bernice
Proposals for an organizational model, job descriptions, and training programs for the supporting staff of school library media systems. 1971.

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The twenty-seven members of the Review Panel which met in Chicago at the Palmer House Hotel on October 21 to 23, 1971 were mailed copies of the SERD and consultants' reports for study before the Panel assembled.

The Ad Hoc Committee charged the Review Panel to consider the following:

1. Evaluate the job models provided in terms of general or specific applicability. What are the strengths and weaknesses of each model? To what extent is each model applicable to different types of libraires? To what extent does each model provide for career development and job satisfaction? To what extent does each model provide educational and training programs not now used with library personnel?

2. What are the implications for library education and training programs for staff librarians, administrators, for continuing education and on-the-job training of all levels of employees?

3. What are the implications of the consultants' papers in terms of budgetary investment and personnel deployment?

4. What tools need to be developed for the use of library administrators as related to these models or this study?

5. What implications for further research or manipulation of the data do you see in the consultants' papers or the SERD study?

6. What are the limitations of the SERD study as you see them?

7. To what extent do the papers support the theoretical base and the categories of the ALA policy statement on manpower?

To see answers to the above questions, the Review Panel was divided into three groups, each with special assignments as follows:

1. Group I to report on the implications of the SERD report and the three consultants' reports on all aspects of library education and training.

2. Group II to report on the limitations of the SERD report; on the need for further task data manipulation and related research for effective library personnel utilization; and on a descriptive enumeration of additional tools needed by library administrators for effective use of task data for library personnel utilization.

3. Group III to report on an evaluation of the three consultants' reports; on the implications of the job model (consultants') reports in terms of budgetary investment and personnel deployment; and on the extent the SERD report and consultants' reports support the theoretical base and categories in the ALA statement on manpower.

The Review Panel met as a committee-of-the-whole for their initial session on Thursday evening, October 21, and at 11 a.m. and 4 p.m. on the 22nd, and from 9 a.m. until noon on the 23rd. The remaining meeting time was consumed in the group sessions. The committee-of-the-whole sessions were recorded, and each of the three groups submitted written reports at the final review discussions.

Dr. Charles Bunge stated a prevailing view of the Panel when he said, "We're on the threshold of something very useful for the library world as an outgrowth of the SERD task analysis study and the subsequent activities." Also, an unanimous vote of thanks was extended by the Review Panel to the Illinois Library Association and its Ad Hoc Committee, the cooperating Divisions of the American Library Association, the Illinois State Library and all those involved in the Library Task Analysis Project for conducting such a significant and innovative project. Regarding the funding of the project, Mr. A. Trezza, the Director of the Illinois State Dibrary, said, "We are trying in Illinois to do things with LSCA funds that are not only good for Illinois but bood nationally."

In both the group sessions and the committee-of-the whole sessions, the deficiencies of the SERD and consultants' reports were identified in part as follows:

1. Too many of the tasks listed in the SERD report were duplications.
2. Many of the tasks were ambiguous.
3. Many tasks described as a single task were in fact clusters of tasks.
4. The Wiese report did not consider professional tasks for school libraries and media centers.
5. The SERD report, by its nature, could not consider tasks needed in libraries in the near future.
6. Task analysis can not reveal what is not done.
7. The report did not identify tasks done only in libraries of of a certain size or of specific type.

The SERD report was not considered to be a tool ready to be used by librarians and administrators, but it was thought to be a landmark report for libraianship--one that future task analysis studies could learn from--one that had identified most of the tasks being performed in libraries in the 1970's. The Review Panel adopted the following statement prepared by Jack Chitwood as a basic premise:

> "The SERD Report does what the Ad Hoc Committee asked SERD to do, and the SERD findings as well as the documents produced by the three consultants support the theory that there are hundreds of tasks being done in all kinds of libraries which do not require professionally trained librarians but which many librarians and people concerned with libraries presume to be part of the working requirements of a professional librarian. Many library organizational patterns, job descriptions, salary schedules reflect this; and it is particularly prevalent in the attitudes of the traditionally oriented librarians.
>
> "This study provides documentation for those who want to make better use of professionally trained librarians. The study justifies assigning thse non-professional tasks to more appropriate personnel at lower training levels without downgrading library services. Actually the release of professional personnel from the lower level tasks should improve services and at the same time give better job satisfaction to all levels of library employment.

"The SERD document supports the best library school programs; those which do not concentrate on technical training. Not much is said about the technical training, but administrators are indicted for misuse of personnel.

"The SERD study could have been more sophisticated, we are willing to grant, but this fact does not limit its basic usefulness nor its basic purpose. Consultant Bernice Wiese recorded two statements in her report which should be noted here:

> 'The SERD report...may serve as a guide to indicate the utilization of manpower for low-level tasks requiring little education and also utilization of manpower for high-level tasks requiring considerable education and ability,
>
> and
>
> 'Will this study (SERD) lead to more supporting library jobs allowing more time for librarians to engage in more activities exploring the needs of the changing population and taking action to meet these needs?'

Group I in their first report to the Review Panel listed twenty questions which included the following:

> Can the tasks appropriate to the Library Associate level be identified in the SERD and consultants' reports?
>
> Is task analysis as a research technique an appropriate basis for planning educational programs for library personnel?
>
> Can a full library staff be put together from the tasks listed in the SERD report, and what kind of a staff would it be?
>
> To what extent are librarians willing to accept the assumption that everything they do can be broken down into tasks with data that can be manipulated by computer?
>
> What factors in the reports would be involved in structuring educational programs in junior colleges?
>
> To what extent could the reports be used to evaluate library education?

The SERD and consultants' reports will be available through ERIC for the limited audience of library educators, researchers, and administrators who can use the data for educational or research purposes. The computer data base for the SERD report can be purchased from the Argonne National Laboratory in Chicago; copies of the reports are available on Interlibrary loan from the library of the American Library Association in Chicago.

The Review Panel learned from Panel Member Adeline Padgett that the U.S. Department of Labor has valuable input for reearch in task analysis. Miss Padgett represented the Division of Occupational Analysis and Career Information of the Department of Labor in Washington. It was learned, for example, that the Los Angeles Occupational Analysis Field Center was assigned to conduct studies including preparation of job analysis schedules, physical demands analysis, staffing schedules and narrative reports on approximately one hundred industries and occupational activity areas. Library is one of the areas assigned to the Los Angeles Field Center. Completion is scheduled during 1972 of a national brochure on Occupations in the Field of Library Science for submission to the Washington Office for review. Miss Padgett indicated that she would send the review draft to representatives of the Illinois Library Task Analysis Project for counsel on the assignmentof tasks in the job analysis.

The following Department of Labor publications were listed by Miss Padgett as being pertinent in library task analysis work:

1. Dictionary of Occupational Titles, 3rd ed., 1965.
2. Relating General Educational Development to Career Planning. 1971.
3. A Handbook for Job Restructuring. 1970.
   (This latter contains a four page bibliography)

The Review Panel agreed that a new publication was needed which would serve the dual purposes of:

1. An improved substitute for the out-of-print book, ALA Description of Professional and Non-professional duties .
2. A synthesis of the data in the SERD and consultants' reports which could be field tested in a number of libraries as a task analysis and job restructuring handbook for libraries.

The arrangement used by Consultant Ricking is an appendix section of her report was favor as being more useful than that used in the ALA LIST. MissRicking has selected 840 public library related tasks from the 1615 SERD identified tasks. In the Appendix of the Ricking Report, the 840 tasks were arranged by job categories beginning with clerical up through senior librarian.

The new publication proposed by the Review Panel was outlined to include the following parts, sections or chapters:

I. Introduction
   Job restructuring
   Analysis of activities, functions, sub-functions, tasks, elements,etc

II. Guidelines for determining institutional or agency objectives.
   Representative statements of objectives for
   - Public libraries
   - School libraries
   - Academic libraries
   - Special libraries

III List of library functions under which would appear sub-functions, tasks, elements, eqt.

IV. Detailed bibliography and iddex.

Ed Howard appealed for a pamphlet on the same theme which might be called a Handbook for Library Workers--something any staff member could use to define his own job from the tasks performed in the library. Such a handbook might also propose a career ladder.

Mr. Marsh W. Bates, Manager of Communications, Development and Training, West Center, for Edward N. Hay & Associates, proposed other concepts which would be incorporated into a proposed new publication on library task analysis and job restructuring and agreed to draft these more completely in a letter to Mr. Brown. Mr. Bates' letter is attached.

There was agreement that an article was needed for American Libraries which would summarize, describe, and evaluate the SERD and consultants' reports; which would tell the library world that task analysis data exists, giving guidance on its current state of usefulness and the means of access to the reports and data base. The same article might include information on the job information data for school libraries available through the Knapp School Library Project.

The article proposed for American Libraries was one of a series of promotional ideas to spread the concept of task analysis for libraries. Group I outlined such promotional concepts effectively as follows:

I. Needs for education and training implied by the project.

A. Top level administrators need to be educated in the rationale, concepts, and skills of task analysis and job restructuring, as part of personnel administration.

B. Middle-level and lower level managers need to be educated assisting in the application of task analysis and job restructuring in their areas of responsibility.

C. All library staff members need to be educated in participating in and accepting task analysis and job restructuring.

D. Library staff members at all levels need to have available to them educational programs to enable them to move up the career ladders created by task analysis and job restructuring.

E. Part of the education for the professional aspects of librarianship (wherever it occurs) should include education to be sensitive to the characteristics of professional level performance. Such staff members should have effective knowledge and a positive attitude concerning the disctinction between professional and non-professional tasks and should be dissatisfied with jobs composed in large measure of the latter. This implies that the professional staff member possess the attitude and competencies necessary to accomplish the types of duties so well outlined in point 8 of the Library Education and Manpower statement of ALA as adop ed June 30, 1970

II. Responsibilities for educational programs.

A. Educational consultants, officers, committees, etc. at the library system, network, regional or state level:

1. Plan, obtain funding for, and assist in the execution of training programs addressed to the needs above.

   a. Workshops and institutes on application of task analysis and job restructuring for administrators.

   b. Workshops and institutes for administrators on the education of lower level personnel in participating in and accepting task analysis and job restructuring.

   c. Staff training programs for library staffs.

2. Serve as liaison between library schools, libraries and others.

B. Local library staff development programs (especially in sizeable libraries).

1. Plan and execute education programs addressed to the needs identified in item I above.

   a. Released time for attendance at outside-the-library programs (especially for items IA and E above).

   b. Programs within the library addressed to items IB through E.

2. Communicate with library schools on educational needs and willingness to employ and use effectively graduates who have been trained to appproach librarianship professionally and to be dissatisfied with sub-professional jobs.

C. Library schools

1. Identify and cultivate persons with knowledge and expertise in task analysis and job restructuring whether on library school faculties, other university department faculties, or elsewhere to give assistance in the educational programs discussed in all aspects of the Illinois Library Task Analysis Project.

2. Work with the individuals and groups mentioned above in development and execution of educational programs addressed to the needs outlined above.

3. Work with appropriate agencies and groups to effect the proper correlation between degrees, certificates, and other credentials, on the one hand, and the requirements for certification, promotion, tenure, etc. on the other hand.

4. Encourage the development of instructional and educational materials necessary for the educational programs outlined above.

5. Plan and execute education programs for the first professional degree that are addressed to the concern expressed in item IE above.

D. Library education programs in institutions of higher education at levels below the first professional degree need to examine the SERD and consultants' reports for assistance in planning educational programs for appropriate sub-professional categores.

General endorsement was given to state libraries and library schools to sponsor workshops for library administrators, trustees, personnel directors, and layment to learn to apply the task analysis and job restructuring techniques. The Illinois State Library looked with favor to funding an Illinois Library school sponsored workshop on the subject of task analysis which would be useful to Illinois libraries and librarians but not limited to Illinois Library interests. Other library schools reprewented on the Review Panel were considered as prospects for assuming leadership in development workshop programs on task analysis.

EDWARD N. HAY & ASSOCIATES

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November 2, 1971

Mr. Thomas M. Brown
Chairman, Advisory Committee
Illinois Library Task Analysis Project
c/o New Trier High School West
7 Happ Road
Northfield, Illinois 60093

Dear Tom:

As promised, here is a quick recap of the data segmentation and analysis technique I suggested at our October 21-23 meetings. I've gone beyond that point to suggest what might result.

First, develop a chart of "Signifigant Elements of Library Service" which would split basic activity areas into:

A. Activities basic to patron service

1. Technical Services
2. Reference -- etc.

B. Activities basic to support and control

1. Personnel
2. Finance -- etc.

These may either be current "functional" areas or (how would they be determined) new combinations of effort that form new activity areas.

Second, further refine these activity areas into functions, for example:

A-1 Technical Services

a. Acquisition
b. Cataloging
-- etc.

B-1 Personnel

a. Employment
b. Compensation
-- etc.

Third, further refine these functions into sub-functions, for example:

A-1a Acquisition

-- material review
-- source selection
-- etc.

B-1a Employment

-- recruiting
-- interviewing
-- etc.

Fourth, a task force of experienced librarians and job content experts could then take the 1600 SERD tasks, sorted by "function" and assign them to the appropriate area of this more sophisticated breakdown in decreasing order of experience requirement (again as identified by SERD). The first tasks assigned might be those found in all libraries, with supplemental task modules identified and related to the sub-functions as they would be found in different kinds of libraries.

Fifth, this task force could then evaluate the real skill and experience required in each task and in logical task clusters. Each library -- dependent on size and organization -- will place different tasks and task clusters in different jobs. The staffing demand of the job will generally be determined by the most difficult task, task cluster or combination of task clusters in terms of requirements for:

- Knowledge and skills

-- basic, technical or specialized
-- supervisory, managerial or administrative
-- human relations

- Thinking or Problem-Solving

  -- challenge
  -- specificity of orientation

- Accountability

  -- freedom of action
  -- type of impact (direct or supportive)
  -- magnitude impacted upon

Sixth, prototype jobs at varying job levels and in libraries of different nature and size could be developed and described by pulling together logical task clusters that require similar experience/knowledge levels.

Seventh, jobs, and the organization itself, might be signifigantly enriched by rearranging compatible task clusters that would add variety and perspective to jobs and increase parton service.

Eighth, typical career paths could be identified and the performance deficiencies of aspirants analyzed in terms of tasks and task clusters.

Ninth, utilizing known performance deficiencies and the task and task cluster breakdown a linear approach to aspirant training could be developed.

Tenth -- nirvana -- or by this time patron needs, tasks, mechanization, applicant skills, etc. have changed enough that the whole system needs revision.

Tom, this is a gross oversimplification. The end points seen in items seven, eight and nine are in the future by thousands of applied man hours. This is, however, one logical way that the whole profession could be served by your investment.

EDWARD N. HAY & ASSOCIATES

I enjoyed my time with you and your task force last month. I certainly came away with an appreciation of the problems facing the task force and the profession. I'll be pleased to comment further as desired.

Sincerely,

Marsh W. Bates, Manager
Communications, Development
and Training, West Center

MWB:bk

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Palmer House, Chicago

October 21 - 23, 1971

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